



# Lewisham Council

## On-premise CRM to Dynamics 365 Cloud Migration for Lewisham Council

### Summary:



Access to enhanced Dynamics Cloud features and capability



Seamless, secure migration of high volume CRM data



Minimal, planned service disruption for critical customer-facing system with numerous integrations to other solutions



Partnership with trusted data migration specialist partner: Synchronicity



Future proofed with capability for advanced online customer service

**“I have high expectations of vendors and partners – Xpedition meets them. Since our first CRM procurement process ten years ago, we’ve developed a lot of trust and a strong collaboration. For this project, we had a consultant here a day a week: he was flexible and helpful accommodating changes and unpredictable factors relating to other IT work happening at the same time.”**

Sandi Leonties, Change and Innovation Manager,  
Lewisham Council

### The Challenge:

#### High volume data and many transactions

Lewisham citizens use the council’s website for more than 100 different transactions and requests. The most popular is paying council tax. Customers complete a TeamKnowledge form, which saves the details in CRM as a service request. Card payment is taken through a secure portal, then an activity is created in CRM to update payment records and trigger any follow-on activity. There’s also calendar integration, for appointment booking where needed.

Other transactions include: booking to register a birth, ordering blue badges, renewing garden waste subscriptions, reporting highway damage, and missed kerbside collections.

With Microsoft Dynamics CRM 365 having already proved its worth, Lewisham’s team wanted to move from the on-premise version to the latest cloud-based version to access new features and capabilities that will further improve services in the future.

Citizens set up an online account to access web services: the council typically handles over 1,000 cases a day from logged-in customers. Lewisham Council needed to transfer a great deal of customer data - at least 100GB in total. A reliable and secure migration of this high volume of account and transaction data was therefore key to minimising service downtime and disruption to citizens.

**“We’re investing in the latest and best digital technology to enhance functionality in the future for even better customer engagement and communication.”**

Sandi Leonties

### The Solution:

#### Proven, reliable, efficient process

Xpedition carried out much of the migration work remotely, keeping costs under control and minimising disruption in the office. The team had an in-depth understanding of Lewisham’s priorities, due to a detailed and effective migration project scoping exercise carried out on-site before the work began.

A small team of developers worked off-site to upgrade the integrations and make code compatible with the new version. They provisioned the new Dynamics Cloud platform with Lewisham’s specific functionality, and supplied the data to specialist migration partner Synchronicity to ensure a smooth and effective migration. Historic data was moved in batches over several weekends. Completion of the final batch of data was achieved on the ‘go-live’ weekend.

### The Service:

#### Low-risk, high volume data migration to the Cloud

The Synchronicity Echo Managed Service takes the stress and strain out of a Dynamics On-Premise to Dynamics 365 online migration. Using specialised scripts and a set of custom applications, the Synchronicity team migrates all the data from a source Dynamics CRM database to the latest version of Dynamics 365 with minimal mapping and intervention. This repeatability greatly reduces the risk to a migration project, and provides assurance that the latest API changes made by Microsoft won’t affect the process. Xpedition works with Synchronicity’s specialists to manage the process end-to-end, until the source database is fully migrated and thorough testing is successfully completed.

**“We launched Dynamics CRM on-premise a decade ago and subsequently upgraded to the 2013 version. By 2016 we were looking to improve and upgrade our entire office platform, including CRM and our external website. As part of that we decided to migrate and upgrade to the latest release of Dynamics. We wanted to use CRM strategically, making good use of new features and enhancements in the cloud version.”**

**Sandi Leonties**



#### **The Results:**

##### **A platform fit for the future of citizens transactions**

During the go-live weekend, all on-premise servers were stopped on a Friday, a web redirect was deployed and the final back-up was downloaded and sent. Synchronicity uploaded the final data to the new platform and updated the status of the records. Xpedition switched on the new code on Saturday night. On the Sunday, Lewisham's team carried out testing and the new platform went live on Monday morning.

This smooth and carefully managed migration was organised with user service continuity in mind – there was a planned outage of just one weekend.

With the new platform in operation, the council's team has great potential at its fingertips, both in terms of system agility and future development. Mobile access to the system back-end is now possible, allowing more flexible and responsive working by Lewisham's service and IT professionals. They have the ability to forge ahead to develop accessible and engaging online services for customers, increasing self-service and delivering intuitive portals using the latest secure technology to handle ever-growing data volumes.

**“Lewisham is always striving to provide excellent customer service in all our transactions. As we move more and more online, more transactions depend on CRM integration. The main drivers are delivering great customer service, including first time resolution and ease of use, as well as efficiency – the cost per transaction. Our new cloud-based Dynamics CRM makes the front office platform more reliable, more agile and easier to develop and refine.”**

Sandi Leonties

#### **About Xpedition**

Xpedition is the smarter alternative to traditional CRM consultancy. Everything we do is designed to make sure you get the full value from your CRM investment. Through our market leading expertise and unique methodology we've helped clients increase sales performance and operational efficiency, improve marketing ROI, transform stakeholder relationships, and develop tighter bonds of customer loyalty.

What can we do for you?

#### **About Synchronicity**

The Synchronicity Echo Managed Service is the intelligent alternative to standard Dynamics On-Premise to Dynamics 365 online cloud migration services.

Using specialised scripts and a set of custom applications, the Synchronicity team are able to migrate all the data from a source Dynamics CRM database to Dynamics 365 (latest version) with minimal mapping and intervention.

Synchronicity manages the process end-to-end, taking the source database and managing the entire data migration until the process is complete. With minimal disruption and at around 10% of the cost of, like-for-like data services engagement, Synchronicity is the pioneer in Dynamics data migration.

**synchronicity** 

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